

Employee Post-Travel Disclosure of Travel Expenses

Date/Time Stamp:

Post-Travel Filing Instructions: Complete this form within **30 days** of returning from travel. Submit all forms to the **Office of Public Records in 232 Hart Building**.

In compliance with Rule 35.2(a) and (c), I make the following disclosures with respect to travel expenses that have been or will be reimbursed/paid for me. I also certify that I have attached:

- ☒ The **original** *Employee Pre-Travel Authorization* (Form RE-1), **AND**
☒ A **copy** of the *Private Sponsor Travel Certification Form* with all attachments (itinerary, invitee list, etc.)

The Pew Charitable Trusts

Private Sponsor(s) (list all):

Travel date(s): 9/10/2021 - 9/12/2021 (I left early and did not participate in events on 9/12/2021)

Name of accompanying family member (if any): n/a

Relationship to Traveler: ☐ Spouse ☐ Child

IF THE COST OF LODGING **DID NOT INCREASE** DUE TO THE ACCOMPANYING SPOUSE OR DEPENDENT CHILD, ONLY INCLUDE LODGING COSTS IN EMPLOYEE EXPENSES. (Attach additional pages if necessary.)

Expenses for Employee:

| | Transportation Expenses | Lodging Expenses | Meal Expenses | Other Expenses (Amount & Description) |
|---|--|----------------------------|------------------|---------------------------------------|
| <input type="checkbox"/> Good Faith Estimate | | | | |
| <input checked="" type="checkbox"/> Actual Amount | \$475 total: (\$230 Amtrak one way; \$125 coach bus in NYC; \$120 ferry to and from Ellis Island) | \$286/night \$572 total | \$228 (\$76/day) | none |

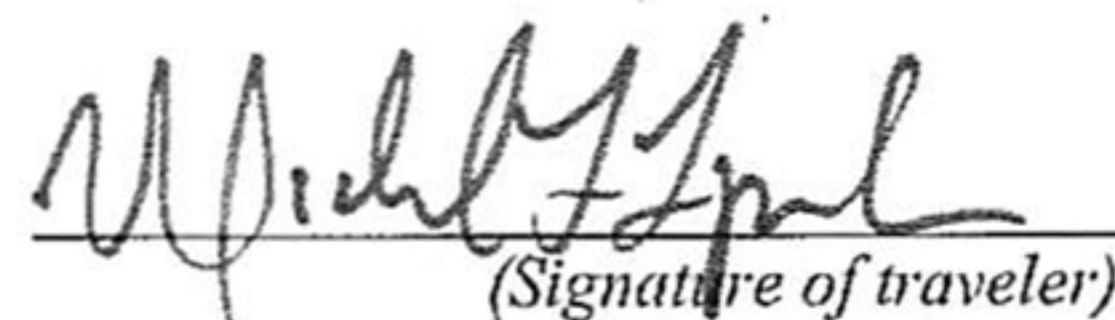
Expenses for Accompanying Spouse or Dependent Child (if applicable):

| | Transportation Expenses | Lodging Expenses | Meal Expenses | Other Expenses (Amount & Description) |
|--|-------------------------|------------------|---------------|---------------------------------------|
| <input type="checkbox"/> Good Faith Estimate | | | | |
| <input type="checkbox"/> Actual Amount | n/a | n/a | n/a | n/a |

Provide a description of all meetings and events attended. See Senate Rule 35.2(c)(6). (Attach additional pages if necessary.): Attached

19 Oct 2021
(Date)

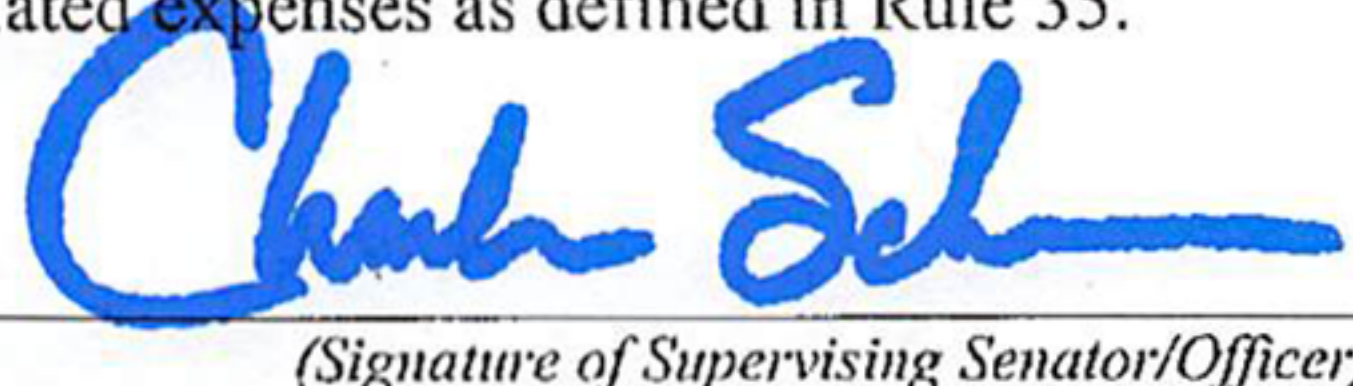
Michael L. Lynch
(Printed name of traveler)


(Signature of traveler)

TO BE COMPLETED BY SUPERVISING MEMBER/OFFICER:

I have made a determination that the expenses set out above in connections with travel described in the *Employee Pre-Travel Authorization* form, are necessary transportation, lodging, and related expenses as defined in Rule 35.

10/19/21
(Date)


(Signature of Supervising Senator/Officer)

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10/19/21

PRIVATE SPONSOR TRAVEL CERTIFICATION FORM

This form must be completed by any private entity offering to provide travel or reimbursement for travel to Senate Members, officers, or employees (Senate Rule 35, clause 2). Each sponsor of a fact-finding trip must sign the completed form. The trip sponsor(s) must provide a copy of the completed form to each invited Senate traveler, who will then forward it to the Ethics Committee with any other required materials. The trip sponsor(s) should **NOT** submit the form directly to the Ethics Committee. Please consult the accompanying instructions for more detailed definitions and other key information.

The Senate Member, officer, or employee **MUST** also provide a copy of this form, along with the appropriate travel authorization and reimbursement form, to the Office of Public Records (OPR), Room 232 of the Hart Building, within thirty (30) days after the travel is completed.

-
1. Sponsor(s) of the trip (please list all sponsors): The Pew Charitable Trusts
 2. Description of the trip: Bipartisan Senate Chiefs of Staff Conference
 3. Dates of travel: 9/10/2021 - 9/12/2021
 4. Place of travel: New York, NY
 5. Name and title of Senate invitees: Chiefs of Staff (see attached list)
 6. I *certify* that the trip fits one of the following categories:
 - ☐ (A) The sponsor(s) are not registered lobbyists or agents of a foreign principal **and** do not retain or employ registered lobbyists or agents of a foreign principal **and** no lobbyist or agents of a foreign principal will accompany the Member, officer, or employee *at any point* throughout the trip.
 - OR -**
 - ☒ (B) The sponsor or sponsors are not registered lobbyists or agents of a foreign principal, but retain or employ one or more registered lobbyists or agents of a foreign principal and the trip meets the requirements of Senate Rule 35.2(a)(2)(A)(i) or (ii) (*see question 9*).
 7. ☒ I *certify* that the trip will not be financed in any part by a registered lobbyist or agent of a foreign principal.
 - AND -**
 - ☒ I *certify* that the sponsor or sponsors will not accept funds or in-kind contributions earmarked directly or indirectly for the purpose of financing this specific trip from a registered lobbyist or agent of a foreign principal or from a private entity that retains or employs one or more registered lobbyists or agents of a foreign principal.
 8. I *certify* that:
 - ☒ The trip will not in any part be planned, organized, requested, or arranged by a registered lobbyist or agent of a foreign principal except for *de minimis* lobbyist involvement.
 - AND -**
 - ☒ The traveler will not be accompanied on the trip by a registered lobbyist or agent of a foreign principal except as provided for by Committee regulations relating to lobbyist accompaniment (*see question 9*).

9. **USE ONLY IF YOU CHECKED QUESTION 6(B)**

I *certify* that if the sponsor or sponsors retain or employ one or more registered lobbyists or agents of a foreign principal, one of the following scenarios applies:

☐ (A) The trip is for attendance or participation in a one-day event (exclusive of travel time and **one** overnight stay) and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee *on any segment* of the trip.

- OR -

☐ (B) The trip is for attendance or participation in a one-day event (exclusive of travel time and **two** overnight stays) and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee *on any segment* of the trip (*see questions 6 and 10*).

- OR -

☒ (C) The trip is being sponsored only by an organization or organizations designated under § 501(c)(3) of the Internal Revenue Code of 1986 and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee *at any point* throughout the trip.

10. **USE ONLY IF YOU CHECKED QUESTION 9(B)**

If the trip includes two overnight stays, please explain why the second night is practically required for Senate invitees to participate in the travel:

11. ☒ An itinerary for the trip is attached to this form. I *certify* that the attached itinerary is a detailed (hour-by-hour), complete, and final itinerary for the trip.

12. Briefly describe the role of each sponsor in organizing and conducting the trip:

The Pew Charitable Trusts is the sole organizer and sponsor of this trip

13. Briefly describe the stated mission of each sponsor and how the purpose of the trip relates to that mission:

See attachment

14. Briefly describe each sponsor's prior history of sponsoring congressional trips:

See attachment

15. Briefly describe the educational activities performed by each sponsor (other than sponsoring congressional trips):

see attachment

16. Total Expenses for Each Participant:

| | Transportation Expenses | Lodging Expenses | Meal Expenses | Other Expenses |
|--------------------------|--|----------------------------|------------------|----------------|
| 18:J Good Faith estimate | \$475 total: | \$286/night \$572 total | \$228 (\$76/day) | none |
| D Actual Amounts | (\$230/ Amtrak roundtrip \$125.00 - coach bus in NYC \$120 - ferry to and from Ellis Island) | | | |

17. State whether a) the trip involves an event that is arranged or organized *without regard* to congressional participation or b) the trip involves an event that is arranged or organized *specifically with regard* to congressional participation:

This trip has been arranged specifically with regard to congressional participation

18. Reason for selecting the location of the event or trip

New York was selected, as the weekend coincides with the 20th anniversary of the 9/11 terrorist attacks.

19. Name and location of hotel or other lodging facility:

New York Marriott Downtown

20. Reason(s) for selecting hotel or other lodging facility:

New York Marriott Downtown can provide the necessary meeting space for the planned seminars, is

located in proximity to 9/11 Memorial & Museum and can provide the required number of guest rooms to

accommodate the group

21. Describe how the daily expenses for lodging, meals, and other expenses provided to trip participants compares to the maximum per diem rates for official Federal Government travel:

Lodging and meals are equal to the federal per diem rate for New York, NY.

22. Describe the type and class of transportation being provided. Indicate whether coach, business-class or first class transportation will be provided. If first-class fare is being provided, please explain why first-class travel is necessary:

Roundtrip transportation to New York will be provided via coach Amtrak train.

Transportation in NYC will be provided via coach buses and a ferry

23. ☒ I represent that the travel expenses that will be paid for or reimbursed to Senate invitees do not include expenditures for recreational activities, alcohol, or entertainment (other than entertainment provided to all attendees as an integral part of the event, as permissible under Senate Rule 35).

24. List any entertainment that will be provided to, paid for, or reimbursed to Senate invitees and explain why the entertainment is an integral part of the event:

none

25. I hereby *certify* that the information contained herein is true, complete and correct. (For trips involving more than one sponsor, you ~~must include a completed signature page for each additional sponsor~~):

Signature of Travel Sponsor: Tamera Luzzatto

Name and Title: Tamera Luzzatto, Senior Vice President, Government Relations

Name of Organization: The Pew Charitable Trusts

Address: 901 E Street, NW, Washington, DC, 20004

Telephone Number: 202.540.6501

Fax Number: _____

E-mail Address: tluzzatto@pewtrusts.org



Bipartisan Senate Chiefs of Staff Conference

New York City | September 10-12, 2021



Friday, September 10, 2021

- 9:30am Attendees unable to obtain COVID testing through the Office of Attending Physician (OAP) or obtain a test within 72 hours of departure arrive at Union Station, Gate G, for COVID testing
(Senate Staff who can be tested at the OAP should do so within 72 hours of departure; we will only have tests for non-staff)
- 10:00am Attendees who have obtained a COVID test within 72 hours of departure check in at Union Station, Gate G.
Grab and go box lunches and beverages provided during check in.
- 11:05am Depart for NYC via Amtrak 84
- 2:33pm Arrive New York City, Penn Station/Moynihan Hall
Board buses based on last name, as marked
- 3:30pm Check in to Marriott Downtown
85 West Street at Albany Street
- 4:50pm Meet in Hotel Lobby for Transportation to Gracie Mansion
- 6:00-8:00pm **Reception at Gracie Mansion Hosted by Mayor Bill de Blasio**
Mayor de Blasio will share reflections on the 9/11 attacks and the nation's largest city's approach to recovery from the effects of the COVID-19 pandemic on the city's economy and its citizens' health.

Saturday, September 11, 2021

- 7:30-9:30am Breakfast at your leisure, Marriott Downtown Hotel
Financial Ballroom, Second Floor
- 8:30-9:45am **Reading of the Names of 9/11 Victims**
Moments of Silence at 8:46 and 9:03
Broadcast in the Breakfast Room
- 10:00-11:30am **Panel Discussion on Federal Recovery Support After 9/11**
As discussion of legislation for COVID recovery continues, panelists involved in the federal government's response to 9/11 will discuss their experiences. Tamera Luzzatto - moderator (The Pew Charitable Trusts, formerly Senator Clinton's Chief of Staff), Moderator; Polly Trottenberg (former Senator Schumer Staff), Jim Mazzearella (former Governor Pataki staff), and Glen Caplin (formerly Senator Gillibrand's staff).

| | |
|-----------------|---|
| 11:30am-12:00pm | Break |
| 12:00-1:30pm | <p>Lunch Presentation by Jocelyn Kiley, Associate Director, Pew Research Center</p> <p>Presentation on emerging data on general trends and issues related to 9/11</p> |
| 1:30-3:00pm | <p>Panel Discussion: Federal Response to 9/11</p> <p>Family members and other leaders in supporting victims of 9/11 will discuss their experiences. Christine Falvo (Rubenstein, former Senator Clinton staff), Moderator; Mary Fetchet, Founder, Voices of 9/11; Carol Robles-Roman, Dean of Faculty, Hunter College; former Special Counsel /Director of Public Affairs to Chief Judge Judith Kaye and Chief Administrative Judge Jonathan Lippman (2001); Dr. Jacqueline Moline, Chair, Occupational Medicine, North Shore University Hospital; Suzy Ballantyne, Executive Director, 9/11 Health Watch</p> |
| 3:00-5:30pm | Break |
| 5:30pm | Meet in Marriott Lobby for walk/transport to Ferry to Ellis Island |
| 6:00pm | <p>Board Ferry to Ellis Island (this is the only ferry for our group)</p> <p>Please be on time to clear security and be prepared to show your vaccination card to enable an on time departure</p> |
| 6:45-7:45pm | Reception on Ellis Island |
| 7:45-9:00 pm | <p>Dinner and Keynote Address from Admiral William McRaven</p> <p>Admiral McRaven was the chief of the U.S. Special Operations Command (USSOCOM) which had responsibility for synchronizing Department of Defense plans against global terrorist networks and, as directed, conducting global operations. Under his watch, U.S. Special Operations Forces delivered what will be perhaps viewed as the crowning victory in America's war against terror: The May 2011 raid that killed al-Qaeda leader Osama bin Laden. After retiring from military service, he went on to serve as chancellor of the University of Texas and is recognized for his inspirational speeches and writing on leadership.</p> |
| Until 12:00am | <p>The 9/11 Memorial is open until Midnight for its annual Tribute in Lights. More information here:</p> <p>https://www.911memorial.org/visit/memorial/tribute-light</p> |

Sunday, September 12, 2021

| | |
|---------------|---|
| 7:00-8:00am | Breakfast, Bill's Bar & Burger (Hotel Lobby) |
| 7:45-8:00am | Checkout and load bags |
| 8:00 – 8:15am | Walk to 9/11 Memorial Museum |

| | |
|-----------------|---|
| 8:30 Sharp | 9/11 Memorial Museum opens early for our group , which will be greeted at 8:30 by Museum President & CEO Alice Greenwald and Kevin Sheekey, Global Head of External Relations at Bloomberg LP, representing Museum Board Chair Hon. Michael Bloomberg |
| 8:30– 9:30am | Visit to the 9/11 Memorial Museum. For more information on what the group will see on the descent to bedrock: https://911memorial.org/visit/museum/about-museum For more on exhibitions: https://911memorial.org/visit/museum/exhibitions Given time constraints, the museum recommends the group visit the Memoriam exhibition. Finally, there is a names registry where individuals can search for victims from their respective states. You may wish to visit the names on the Memorial Saturday night, and use this tool to locate names geographically: https://names.911memorial.org/ |
| 9:30 am | Depart 9/11 Museum for Marriott Downtown Hotel |
| 9:35 am | Depart Hotel for IAC Building, 555 West 18 th Street |
| 10:00am-11:00am | Lessons Learned During COVID-19: Small Business Owners Asahi Pompey, Global Head of Corporate Engagement, Goldman Sachs (moderator); Louis DeCuzzi, Founder & President, Dirt Road Riding USA (Brunswick, OH); Jessica Johnson-Cope, President, Johnson Security Bureau Inc., Bronx, NY; Margueritte Ramos, Owner, ShadeFLA (Miami); Brent Reaves, President, Smokey John's Bar-B-Que (Dallas). |
| 11:00am-12:00pm | Lessons Learned During COVID-19: Corporations and Philanthropy Kathryn Wylde, President of the non-profit Partnership for New York City (moderator); Darren Walker, President, Ford Foundation; Jonathan D. Gray, President, Blackstone; David Chubak, CEO of US Retail Banking, Citi; Joey Levin, CEO, IAC (formerly InterActive Corp). |
| 12:00pm-12:30pm | Presentation by Barry Diller, Chairman, Expedia and IAC (formerly InterActive Corp.); and Diane von Furstenberg, Chairman, Diane von Furstenberg Studio These prominent civic leaders will welcome the group, discuss their experience as NY employers since 9/11 and specifically their work developing Little Island, HighLine, and other civic ventures including efforts to rejuvenate NYC theatre post-Covid. |
| 12:30pm–2:00pm | Walk to Little Island Picnic lunch. |
| 2:15pm-2:45pm | Transportation to Penn Station |
| 4:05pm | Depart Penn Station/Moynihan Hall for Washington via Amtrak 189 Snacks and beverages provided on board |
| 7:35pm | Arrive Union Station Washington, DC |

EMPLOYEE PRE-TRAVEL AUTHORIZATION

Pre-Travel Filing Instructions: Complete and submit this form at least 30 days prior to the travel departure date to the Select Committee on Ethics in SH-220. Incomplete and late travel submissions will not be considered or approved. This form must be typed and is available as a fillable PDF on the Committee's website at ethics.senate.gov. Retain a copy of your entire pre-travel submission for your required post-travel disclosure.

Date/Time Stamp:

Original Submission

8/11/2021

3:07 pm

Name of Traveler: Michael LynchEmploying Office/Committee: U.S. Senator Charles SchumerPrivate Sponsor(s) (list all): Pew Charitable TrustsTravel date(s): 9/10/21 - 9/12/21*Note: If you plan to extend the trip for any reason you must notify the Committee.*Destination(s): New York, NY

Explain how this trip is specifically connected to the traveler's official or representational duties:

This is a bipartisan chief of staff conference for Senate chiefs of staff which will cover management and leadership skills necessary for me to manage Senator Schumer's office.

Name of accompanying family member (if any): n/aRelationship to Employee: ☐ Spouse ☐ Child

I certify that the information contained in this form is true, complete and correct to the best of my knowledge:

10 AUGUST 2021

(Date)

Michael Lynch

(Signature of Employee)

TO BE COMPLETED BY SUPERVISING SENATOR/OFFICER (President of the Senate, Secretary of the Senate, Sergeant at Arms, Secretary for the Majority, Secretary for the Minority, and Chaplain):

U.S. Senator Charles SchumerMichael LynchI, (Print Senator's/Officer's Name) hereby authorize (Print Traveler's Name)

an employee under my direct supervision, to accept payment or reimbursement for necessary transportation, lodging, and related expenses for travel to the event described above. I have determined that this travel is in connection with his or her duties as a Senate employee or an officeholder, and will not create the appearance that he or she is using public office for private gain.

I have also determined that the attendance of the employee's spouse or child is appropriate to assist in the representation of the Senate. (signify "yes" by checking box) ☐

08/10/2021

(Date)

Charles Schumer

(Signature of Supervising Senator/Officer)